MLSA Centralized Case Management System Information

Overview
The Montana Legal Services Association ("MLSA") was awarded a Legal Services Corporation Technology Initiative Grant ("LSC TIG") to implement a centralized case management system. This system was expected to expand MLSA's capacity to serve clients by allowing staff to (1) manage cases in a more efficient and unified manner, (2) improve efficiency of data reporting, (3) improve communications and increase staff connectivity, and (4) increase pro bono participation.

When MLSA requested the LSC TIG funding to centralize the case management system, the program was using twelve databases that were connected by floppy disks and the USPS. The data was backed up sporadically. Computer hardware and software needed replacing, and intra- and inter-office networks were underdeveloped. Most offices did not have broadband Internet. Before a centralized case management system could be implemented effectively, all of these problems needed to be addressed.

After six months of planning, comparing costs, and researching software, MLSA opted to hire a 0.75 FTE IT Projects Manager/System Administrator to manage MLSA's IT needs and centralize the case management system instead of its previous plan to use consultants for the conversion. Within seven months, the twelve databases were consolidated into one centralized database. In the process, the network design was improved, most offices were upgraded to broadband Internet, hardware and software were replaced, and a back up system was implemented. Data and network security concerns were also analyzed and addressed. This was done for significantly less cost than if MLSA had hired a consultant.

Technical Information
MLSA upgraded from Clients for Windows 98.1 (Access) to PRIME (MSSQL). Running PRIME requires two servers: a Terminal Server and a database server. The Terminal Server has three 30 GB hard drives, 2 GB RAM, and dual 3 GHZ Xeon processors. The database server has three 50 GB hard drives, 2 GB RAM, and dual 3 GHz processors.

The Terminal Server and database server are able to handle 100+ users. Also, the database server can store multiple segregated databases, allowing independent agencies to run PRIME from the same server without concerns about conflicts or security.

Lessons Learned
Based on the project's results, MLSA can make several recommendations for other organizations contemplating launching a similar project.

- Organizations should research the options first. They will be better aware of the potential positive and negative outcomes.

- Organizations should be open and flexible. Problems don't necessarily cause roadblocks; they can be opportunities to try alternative solutions that may be more cost-effective.

- Organizations should balance user need and long-term cost.

Contact Information
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